Payroll Tax Support: Frequently Asked Questions

How do I get started using e-file or e-pay in QuickBooks 2007 (or later)?

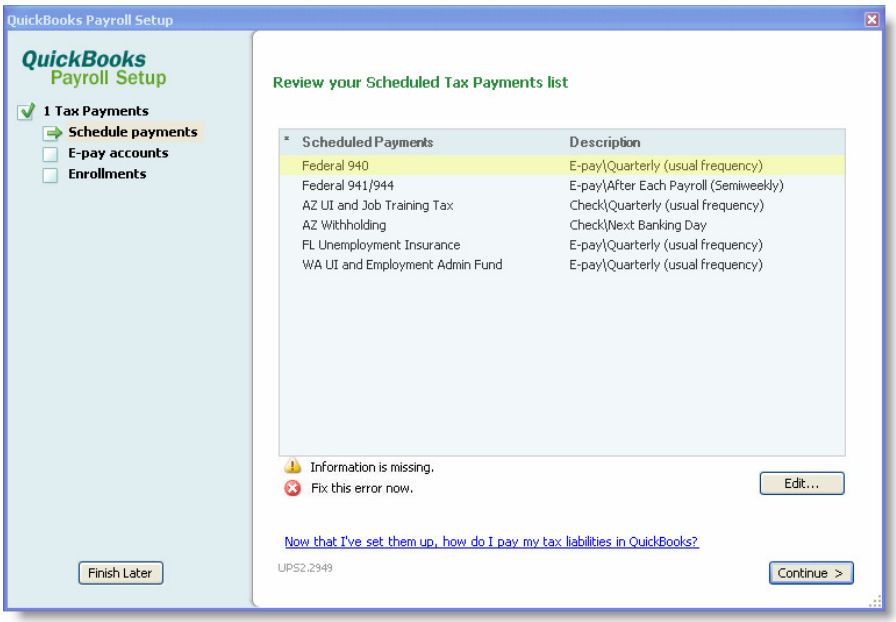
You can electronically file (e-file) federal and selected state payroll tax forms and electronically pay (e-pay) federal and selected state payroll taxes with your QuickBooks Financial Software.

1. **Before You Begin**
   a. Make sure that your **QuickBooks environment is set up correctly**. You must have the following:

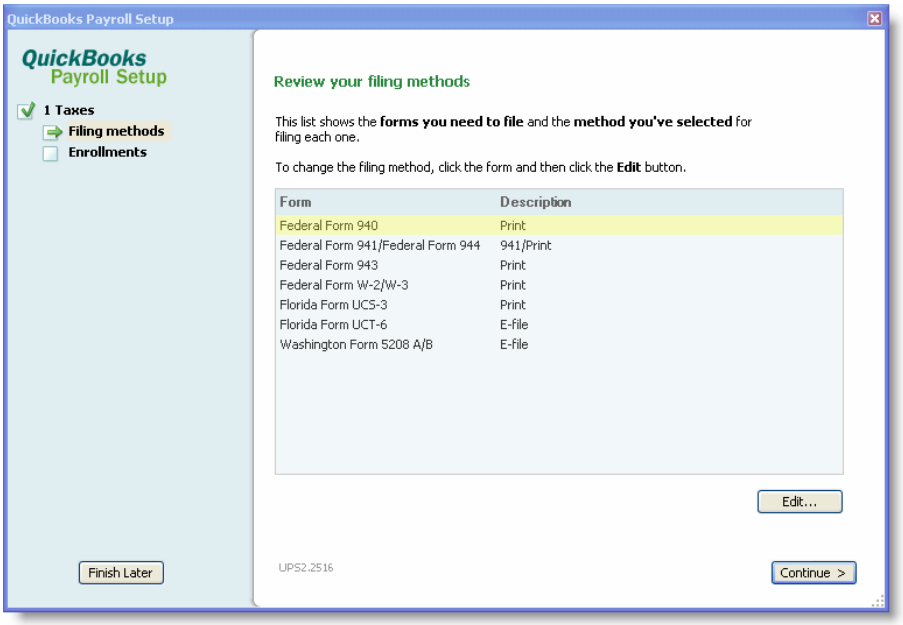
      - **QuickBooks 2007 or later** (with the most current QuickBooks updates http://www.quickbooks.com/helpcenter/ProductUpdates.aspx)
      - An active QuickBooks Enhanced Payroll subscription (http://payroll.intuit.com/payroll_services/enhanced_payroll.jhtml)
      - The most **recent payroll update**
      - An **internet connection**

   b. Confirm that your **tax agencies support e-file or e-pay from QuickBooks**. To see a complete list of supported payroll tax forms and payments, visit the Payroll Tax Forms and Payments page. (http://www.quickbooks.com/support/fileandpay/taxpmts).

2. **Set Up Your Payroll Tax Forms and Payments**
   a. Set up supported payroll tax forms for e-file.
      - From the **Employees** menu, choose **Payroll Center**.
      - In the **File Tax Forms** section, click the **Related Form Activities** drop-down arrow and then select **Edit Filing Methods**.
      - In the payroll setup interview, follow the onscreen instructions.



   b. Set up supported payroll taxes as scheduled payments for e-pay.
      - From the **Employees** menu, choose **Payroll Center**.
      - In the **Pay Scheduled Liabilities** section, click the **Related Payment Activities** drop-down arrow and then select **Edit Payment Due Dates/Methods**.
      - In the payroll setup interview, follow the onscreen instructions.



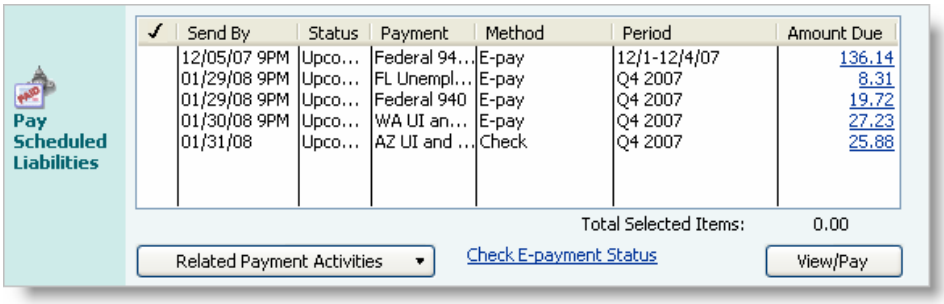
c. Enroll in the agency e-file or e-pay program, if required.
Some agencies require that you enroll in their e-file or e-pay program before you submit an e-filing or e-payment.

The payroll setup interview provides detailed, agency-specific enrollment instructions. Agency enrollment instructions are always available on the E-File & Pay Enrollment Instructions page (http://www.quickbooks.com/support/fileandpay/enroll). If the agency requires that you enroll, be sure that you **complete the enrollment process before you submit a form or payment** from QuickBooks.

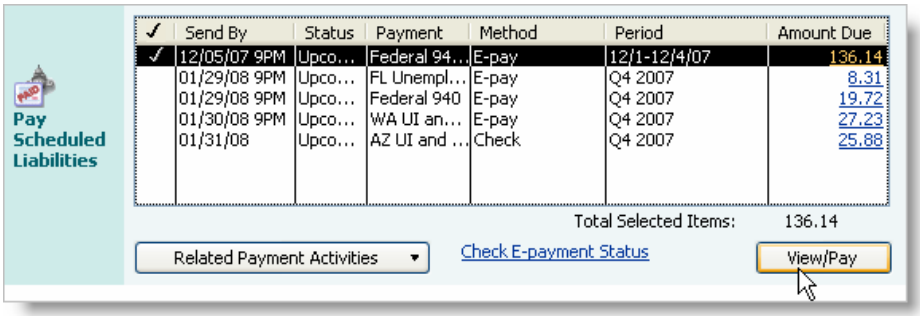
Be sure to keep any agency login details (your PIN, code, password, etc) in a safe place. If the agency requires that you use them when you e-file or e-pay, you'll need them each time you submit an e-filing or e-payment from QuickBooks.

3. What To Do Next

a. Monitor the accrued liabilities or payments in QuickBooks.
As you accrue your payroll liabilities (for example, you run your payroll or make liability adjustments), the liability amounts for payments that you've set up in the payroll setup interview automatically appear in the Pay Scheduled Liabilities section in the Payroll Center. The payment due date and time appears in the Send By column next to the payment.

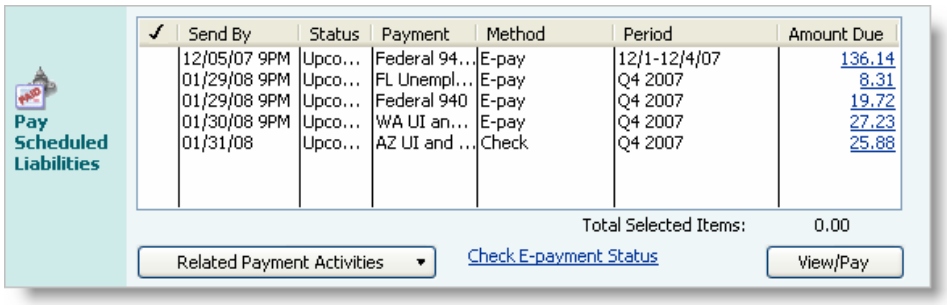


b. Pay your e-payments.
You pay your e-payments on or before the date and time that appears in the Send By column next to the payment in the Pay Scheduled Liabilities section in the Payroll Center. To start, select the payment and then click View/Pay. You can select and pay multiple payments at the same time.



For step-by-step instructions, search the QuickBooks Help for "Submit an e-payment to the agency." To access the QuickBooks Help, go to the **Help** menu in QuickBooks, and then click **QuickBooks Help**.

c. E-file your forms.
To start, click Process Payroll Forms in the File Tax Forms section of the Payroll Center. QuickBooks will guide you through the e-file process.



For step-by-step instructions, search the QuickBooks Help for "E-file a payroll tax form." To access the QuickBooks Help, go to the **Help** menu in QuickBooks, and then click **QuickBooks Help**.

Other Resources

Ask the User Community
(http://quickbooksgroup.com/.ef98590)
Connect with other users and experts to ask questions and find answers.

Find a Local Expert
(http://intuitmarket.intuit.com/QBA/ReferralDB/ReferralDataBaseMemberSearch.asp)
Local Certified QuickBooks ProAdvisors™ can get you set up and provide accounting advice tailored to your business needs. (Fees may apply)

Contact Support
(http://support.quickbooks.intuit.com/Support/ContactSupport.aspx)
Get personalized assistance from a QuickBooks support expert. Learn about free and paid support options.